

Positively Impacting Peoples' Lives since 1881

Roundbank® | Roundbank® Insurance Agency | Investment Solutions

Spring 2014

# in the loop



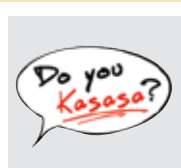
Proper Coverage for Boat Owners  
**INSURE**



Financial Check-Up  
**INVEST**



School Supply Drive  
**DONATE**



Download with Monthly Rewards  
**KASASA**



## POSITIVELY IMPACTING PEOPLES' LIVES – ROUND BANK INSURANCE AGENCY

“Positively Impacting Peoples’ Lives” is the core purpose of the Roundbank organization and a recurring theme for our issue of In the Loop. Our core purpose is firmly rooted in our day-to-day direction and our focus for the future. It is the fundamental reason for our own experience and it goes far, far beyond making money – it is the personal guiding star on the horizon for all Roundbank staff.

In each issue we will be highlighting customers, employees and locations that are positively impacting peoples’ lives. In this feature, we are pleased to highlight the Roundbank Insurance Agency and its history. The agency was known in Waseca as First Insurance in 1931 and in 1987 the agency and bank was purchased by the Claire Erickson family and then the agency name was changed to First State Agency. In 1988 Arveson Agency of Otisco was acquired and the New Richland Agency was acquired in 1989. In 1992, the Waldorf Insurance Agency was acquired at the same time the Waldorf State Bank was purchased. In 2003, First State Agency, a full service insurance provider with common shareholders, changed its name to Roundbank Insurance Agency. The agency kept expanding by acquiring yet another agency, the Krienke Agency in Waseca in 2006. That same year the agency opened its doors in Farmington along with the opening of the new Roundbank location. Roundbank Insurance Agency’s locations in Waseca, New Richland, Waldorf and Farmington employ eight employees with a combined 150 years of service!

Roundbank and Roundbank Insurance Agency share

the same core values of Integrity, Respect, Honesty, Citizenship and Excellence and they demonstrate those values every day in the work they do!

Roundbank Insurance Agency takes pride in being an independent insurance agency serving Southern Minnesota for over 80 years. They have developed a reputation for helping friends and neighbors with the finest personal assistance. As an independent agency, they can select the best options available from many insurance providers, saving you time and money and giving you the flexibility you need.



**WASECA INSURANCE AGENCY STAFF** (from left to right) Back Row: LaVonne Bartz (Agent, CISR), Amy Kruger (Agency Manager), Bev Steffen (Agent), Front Row: Nikki Volker (Customer Service Representative CISR, CPIW, AU), ShaLee White (Bookkeeper/Customer Service Representative)



**INSURANCE AGENTS** (from left to right) Waldorf Insurance Agent Deb Bezdicek, New Richland Insurance Agent CISR Kris Wacholtz, Farmington Insurance Agent Chrystal Gasner

### OWN A BOAT? MAKE SURE YOU HAVE PROPER COVERAGE

Summer is the time of year to enjoy your boat. Many people, however, are unaware of the significant loss exposures associated with boat ownership, and some people mistakenly believe that there is coverage available under other personal policies.

Typically personal auto policies do not provide any liability or physical damage coverage for boats. Other people may look to their homeowners policy for coverage, but most homeowners policies only cover losses arising from certain low-valued or low-powered boats. You should contact our agency to discuss the proper insurance protection for it. Our agents are happy to help.

**Roundbank Insurance Agency** Visit our Facebook page and "like" us today!

*Roundbank Insurance Agency's products and services are NOT FDIC insured, NOT a bank deposit, are NOT insured by any Government Agency, are NOT an obligation of or guaranteed by Roundbank or its affiliates and May Lose Value.*

### EMPLOYEE GROWTH

We welcome the following employees:

- Ron Commins, CFP® Financial Advisor (Farmington Investment Solutions location)
- Hannah Herold, Teller (Waldorf)
- Emily Nelson, Personal Banker (Waseca)
- Jessica Purdie, Loan Operations Specialist (Waseca)

We congratulate the following employees on recent promotions:

- Amanda Androli, Senior Teller (Waseca)
- Kris Rigdon, Teller Manager (all Roundbank Teller Departments)
- Pam Schaper, Retail Banking Manager (Waseca)

### FINANCIAL CHECK-UP

Are you aware of the risks within your investment accounts? Call us today for a review of your portfolio and your concerns about the markets. We'd love to take a look and offer some alternative strategies that would best suit your unique situation.

### Investment Solutions

Insurance and investments are offered through Fintegra Financial Solutions, an independent registered broker/dealer, Member FINRA/SIPC, phone 763.585.0503. Roundbank and Fintegra are not affiliated. Investment Representatives are registered representatives of Fintegra. Investment and Insurance Products: Are NOT Bank Deposits • May Lose Value • Carry NO Financial Institution Guarantee Are NOT Insured By Any Government Agency • Are NOT FDIC Insured

## Customer Appreciation Day!

Save the dates for our Appreciation Days:

Farmington	Waldorf	New Prague	Waseca
Thursday	Friday	Tuesday	Thursday
July 17, 2014	August 8, 2014	August 12, 2014	August 21, 2014
11am-2pm	11am-2pm	11am-2pm	11am-2pm

### SCHOOL SUPPLY DRIVE

Help Support Local Students  
June 30th – August 22nd



Each week a different school supply will be featured on Facebook, our website and in our lobbies. Donate the item of the week and you'll be eligible for weekly prizes and the grand prize drawing!

*This promotion is sponsored by Roundbank. Odds of winning depend on number of entries received. No purchase necessary. Offer is void where prohibited and subject to federal, state and local laws and taxes. Employees of Roundbank, Roundbank Insurance Agency and Investment Solutions are not eligible. Random weekly drawings will be held the following Monday and winners will be notified via telephone. The grand prize drawing will be held on August 25, 2014 and the winner will be notified via telephone.*



### ROUNDBANK MOBILE BANKING

Banking has never been more convenient! You can securely access your account information from any mobile device with text messaging, mobile web access or through a downloadable app. With Roundbank Mobile Banking you can view balances, transaction history,

transfer funds, pay bills, send money to anyone with Popmoney, and locate a nearby Roundbank location or ATM. Roundbank Mobile Banking is FREE and available to personal banking customers currently enrolled in our Internet Banking service. Log into Internet Banking and select Roundbank Mobile Banking or download our app today. Visit [www.roundbank.com](http://www.roundbank.com) for more information including tutorials and FAQ's.



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**Roundbank**

**Waseca**  
507-835-4220  
200 2nd Street NE

**New Prague**  
952-758-BANK (2265)  
1100 1st Street NE

**Farmington**  
651-463-8300  
3380 Vermillion River Trail

**Waldorf**  
507-239-2166  
102 South Main

Member **FDIC**  
[www.roundbank.com](http://www.roundbank.com)



**Roundbank Insurance Agency**

**Waseca**  
507-835-1499  
200 2nd Street NE

**New Richland**  
507-465-8111  
121 South Broadway Ave

**Farmington**  
651-463-4300  
3380 Vermillion River Trail

**Waldorf**  
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102 South Main

[www.roundbankinsurance.com](http://www.roundbankinsurance.com)



**Investment Solutions**

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**Farmington**  
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[www.investmentsolutionsmn.com](http://www.investmentsolutionsmn.com)